

Nonprofit Diagnostic Review Form

ORGANIZATION:	
COMPLETED BY:	
TAX ID#:	

For each question below, select the answer that most accurately describes your organization and fill in the corresponding point value in the box to the right of the question. Answer all questions; points will total automatically below.

MISSION

- | | | Enter your # here |
|---|---|---|
| 1. When was your organization's mission statement written or updated? | | <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div> |
| Within the last few months | 3 | |
| 6 months to 1 year ago | 2 | |
| 1 year to 2 years ago | 1 | |
| More than 2 years ago | 0 | |
| 2. How long is your mission statement? | | <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div> |
| Two paragraphs | 3 | |
| One paragraph | 2 | |
| Three paragraphs | 1 | |
| Longer than three paragraphs | 0 | |
| 3. Would you characterize your written mission statement? | | <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div> |
| Dynamic, passionate and accurate | 3 | |
| Very Accurate | 2 | |
| Unclear | 1 | |
| Indistinguishable from that of similar organizations | 0 | |

PLANNING

- | | | |
|---|---|---|
| 4. When did your organization last undertake a formal planning process? | | <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div> |
| Within the last 6 months | 3 | |
| 6 months to 1 year | 2 | |
| 1 year to 2 years ago | 1 | |
| More than 2 years ago | 0 | |
| 5. Has your organization detailed a long-term or strategic plan in writing? | | <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div> |
| Yes | 3 | |
| "Somewhat" | 1 | |
| No | 0 | |

6. Who are the primary participants in your organization's formal planning process?			
Board and Staff and others	3		
Both Board and Staff	2		
Either Board or Staff	1		
No formal planning process	0		

PROGRAM

7. When did your organization's program/activities last undergo a substantial change, addition, or deletion?			
0 to 6 months ago	3		
6 months to 1 year	2		
1 year to 2 years ago	1		
More than 2 years ago	0		

8. How would you characterize your organization's program compared to those of organizations similar in mission, size and budget?			
Ours is a model for others	3		
Ours has some "catching up" to do	2		
Ours is of a better quality than most	1		
We don't compare our program to others/It is just like that of others	0		

9. Does your organization participate in any "strategic partnership" activities with other private or public organizations?			
Yes	3		
We are in the process of exploring a strategic partnership	2		
No	1		
What is a strategic partnership activity?	0		

FUND DEVELOPMENT

10. In the last completed fiscal year, did your donated funds (unearned revenue):			
Increase over the previous year	3		
Remain level with the previous year	2		
Decrease from the previous year	1		
Don't know/Depends on how you mean that	0		

11. In the current fiscal year, are your donated funds (unearned revenue):			
Increasing over last year	3		
Remaining level with last year	2		
Decreasing from last year	1		
Don't know yet	0		

12. Does your organization have a written fund development master plan?

Yes	3	
"Somewhat"	2	
No	1	
What is a fund development master plan?	0	

13. What is your organization's main source for donated funds (unearned revenue)?

Annual campaign and corporate foundation	3	
Annual campaign	2	
Select major donors	1	
Special events	0	

14. What percentage of donor turnover does your organization experience each year?

10% - 20%	3	
30%	2	
40% - 90%	1	
0% or 100%	0	

VOLUNTEERISM

15. What is the ratio of very active non-Board volunteers to Board + Senior Administrators?

4 vol:1 board + admin	3	
2 vol:1 board + admin	2	
1 vol:1 board + admin	1	
Less than 1:1	0	

16. Is volunteerism at your organization:

Vigorously encouraged and proactively sought	3	
Invited	2	
Suggested	1	
Required/ignored	0	

17. Are volunteers in your organization:

Formally recognized and rewarded	3	
Formally recognized	2	
Rewarded	1	
Neither	0	

PUBLIC/COMMUNITY RELATIONS

18. Who within your organization has primary responsibility for communicating with the press, other media, and the local community?

Public/Community Relations Staff Officer	3	<input type="checkbox"/>
Volunteer	2	
Executive Director	1	
Various/no one individual	0	

19. How often is the community at large invited into your organization's facility?

More than once a year	3	<input type="checkbox"/>
At least once a year	2	
Rarely	1	
Never	0	

20. When was the last time your organization had a significant mention in the local or general media?

Within the last 60 days	3	<input type="checkbox"/>
60 to 90 days ago	2	
90 day to 6 months ago	1	
More than 6 months ago	0	

21. When was the last time your organization had a significant mention in a professional or trade publication?

Within the last 60 days	3	<input type="checkbox"/>
60 to 90 days ago	2	
90 day to 6 months ago	1	
More than 6 months ago	0	

22. Which of the following has the highest recognition factor in your community?

The organization's name	3	<input type="checkbox"/>
The name of one of the organization's programs	2	
Board President or a Board Member	1	
Executive Director	0	

BOARD

23. What percentage of the Board Directorship is in attendance at the average Board meeting?

90% - 100%	3	<input type="checkbox"/>
75% - 90%	2	
50% to 75%	1	
Less than 50%	0	

24. Is there a formal written Board policy or handbook that is given to each member specifically outlining his or her role and responsibilities?

Yes	3	<input type="text"/>
No	0	

25. Is there a formal Board nomination/election process that occurs on a regularly scheduled (annual/bi-annual) basis?

Yes	3	<input type="text"/>
"Somewhat"	1	
No	0	

26. What do your organization's Board Members understand and act on as their primary responsibility?

Fund development	3	<input type="text"/>
Policy	2	
Operations	1	
Attending Board Meetings	0	

27. How often does your Board conduct a one to two-day retreat?

Annually	3	<input type="text"/>
Every two years	2	
No regular schedule, but it does occur when the need arises	1	
Never	0	

28. In your opinion, what percentage of the Board membership is actively involved in the stewardship of your organization?

90% - 100%	3	<input type="text"/>
75% - 90%	2	
50% to 75%	1	
Less than 50%	0	

ADMINISTRATION

29. How would you characterize the effectiveness of your organization's administrative team?

Very strong, well-balanced team	3	<input type="text"/>
Collection of talented professionals	2	
Uneven	1	
"One man band" Executive Director	0	

30. How would you characterize the balance of executive power in your organization?

Board and Administration in equilibrium	3	<input type="text"/>
Executive Director defers to Board	2	
Board defers to Executive Director	1	
Who's running the show	0	

31. How are key administrators encouraged to further their professional development?

Organization requires professional development and pays for it	3	<input type="text"/>
Organization recognizes and rewards professional development	2	
Organization is not opposed to professional development	1	
Organization discourages/penalizes professional development	0	

STAFF

32. How would you characterize the staff turnover rate at your organization?

Low turnover	3	<input type="text"/>
Turnover rate fluctuates widely	2	
High turnover	1	
Very high turnover/no turnover	0	

33. How frequently do most staff members participate in professional development activities at the organization's expense?

Often	3	<input type="text"/>
Occasionally	2	
Extremely rarely	1	
Never	0	

34. Are staff members encouraged to advance within the organization?

Very strongly encouraged; org is creative in accommodating talent	3	<input type="text"/>
Each staff member is on an advancement track	2	
Somewhat encouraged; there is little room for advancement	1	
Not at all/advancement not addressed	0	

35. How would you characterize your staff?

Creative, energetic, committed	3	<input type="text"/>
Competent	2	
Marking time	1	
Disgruntled	0	

FACILITIES

36. Is there a reserve fund set aside for capital improvements, major repairs, deferred maintenance?

Yes	3	<input type="text"/>
Yes, but not adequate	2	
No, but planning one	1	
No	0	

37. When did your organization facility last have a fresh coat of paint?

Within the last 2 years	3	
Within the last 4 years	2	
Within the last 6 years	1	
More than 6 years ago	0	

38. How would you characterize your facility in general?

Plenty of space/room to grow	3	
Adequate	2	
Getting a little tight	1	
Very cramped/Limits our program	0	

FINANCE

39. Last fiscal year, our organization:

Ended the year in the black	3	
Broke even	2	
Ended the year in the red	1	
Don't know/Depends on how you look at it	0	

40. Based on current projections, does your organization expect to finish the current fiscal year:

In the black	3	
Breaking even	2	
In the red	1	
Don't know/Depends on how you look at it	0	

41. Which financial documents are reviewed at every Board meeting?

Budget variance to date, cash flow and earned income	3	
Budget variance to date	2	
Varies	1	
Financial documents are rarely reviewed at Board meeting	0	

TOTAL SCORE WILL CALCULATE HERE:

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NONPROFIT DIAGNOSTIC REVIEW

SCORING GUIDE

100 - 123	Healthy, vibrant organization peaking within the Maintenance/Mature stage or the Creative stage
82-99	<i>Very</i> strong organization, needing continued application of energy resources. Entering the Maintenance/Mature stage or transitioning from Renewal into Maturity
60 - 81	Organization has peaked, needs additional energy and resources in order to re-vitalize. In the late (downswing) stage of Maintenance/Maturity or transitioning from Renewal
41-59	Organization is exhibiting symptoms of hardship or decline and requires serious attention. A critical transition point has been passed without necessary organizational adjustments
0-40	Organization is in serious and advanced stage of decline, facing threat of closure. Without immediate application of energy and resources - most probably under new leadership – the organization will fail